

DAF Readiness Checklist



Use DAF Day to put donor-advised funds on your donor's radar—and keep them visible throughout year-end giving season.

*Full-Circle Strategies for
Forward-Thinking Missions*

DAF Day 2026 is October 8, making it a timely opportunity to remind donors that they can support your mission through their donor-advised funds. Use this checklist to make sure your organization is ready for DAF Day—and prepared to carry that visibility through Giving Tuesday, December and beyond.

PREPARE: Get DAF-Ready Before October 8

☐ **Identify your existing DAF donors.**

Review your gift history for grants from DAF sponsors such as Fidelity Charitable, Schwab Charitable, Vanguard Charitable and community foundations. Connect those gifts to the individuals who recommended them whenever possible.

☐ **Make DAF giving easy to find.**

Review your website and make sure donors can readily find information about giving through a donor-advised fund, particularly on your Ways to Give and donation pages.

☐ **Provide the information donors need.**

Make your organization's legal name, EIN and basic instructions for recommending a DAF grant easy to locate.

☐ **Review the acknowledgment process.**

Make your organization's legal name, EIN and basic instructions for recommending a DAF grant easy to locate.

ACTIVATE: Use DAF Day to Build Awareness

☐ **Remind donors that DAF giving is an option.**

Use October 8 as a reason to mention donor-advised funds in email, social media and other donor communications.

☐ **Keep the message simple.**

You don't need another major fundraising campaign. A straightforward reminder such as "Have a donor-advised fund? You can recommend a grant to support our mission" may be enough to prompt action.

☐ **Reduce friction.**

Test the process yourself. Can a donor quickly determine how to recommend a DAF grant to your organization? Consider whether clearer instructions or a DAF giving tool could make the experience easier.

CONTINUE: Keep DAF Giving Visible Through Year-End

☐ **Include DAFs in your year-end giving options.**

Test the process yourself. Can a donor quickly determine how to recommend a DAF grant to your organization? Consider whether clearer instructions or a DAF giving tool could make the experience easier.

☐ **Carry the message through Giving Tuesday and December.**

Don't let DAF visibility disappear after October 8. Look for natural opportunities to remind donors throughout the year-end giving season.

☐ **Steward DAF donors like the donors they are.**

Thank them, report on impact and continue building the relationship. A DAF is simply the vehicle they used to support your mission—not the relationship itself.

DAF Day gives your organization a timely reason to talk about donor-advised funds. The bigger opportunity is making DAF giving easy to understand, easy to find and easy to act on throughout the year. **Mission360 Strategies helps nonprofits strengthen fundraising strategy, donor engagement and the systems that support sustainable growth. Let's make sure every giving opportunity has a clear path to your mission.**

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